

LexSteward

The full feature list

Feature list as of July 9, 2026. Every feature is labeled with an honest status.

Status legend

Live - Usable today by a real firm.

Activates with your account - Built; switches on once the firm connects its account or a connector.

Preview - Demo-grade, rolling out, or tier-gated. Not live for everyone yet.

Roadmap - Planned or spec-only; not built yet.

Get Found

Marketing and acquisition - be the firm clients find on Google and in AI search.

Live Practice-area pages

Owned, AI-optimized pages for each practice area and jurisdiction, with clean structured data.

Fifteen practice-area pages, each with its own JSON-LD so search and answer engines can read and recommend your firm.

Live Legal calculators

Client-side benefit and cost estimators that turn a visitor into a lead.

Twenty-six-plus calculators; they compute in the visitor's browser with zero data retention - only the contact request the visitor chooses to send leaves the page.

Live AEO Audit tool

A free AI-visibility audit with scored, prioritized fixes - no account needed.

Enter your public firm details and get a scored, explained audit of how AI search sees you.

Live AI intake form

A conversational, branching intake that qualifies a lead and relays it to the firm.

Config-driven flow; the only network call is the lead relay.

Live Templates & precedents

Engagement, retainer, and demand-letter templates ready to use.

Live Comparison pages

Honest, sourced cost-and-feature comparisons versus other practice-management systems.

Category-based, sourced, and non-disparaging.

Preview Marketing control center

Firm-side control of your pages, copy, and offers.

Routers exist but it is demo-grade and not yet in the main dashboard.

Roadmap SEO / Get-Found control center

AEO monitoring, local SEO, a content loop, and the review flywheel in one place.

Spec written; not built yet.

Roadmap Local presence (GBP / NAP / reviews)

Local citation and review automation for your Google Business Profile.

Modules exist but there is no UI yet; activates with a Google connector once shipped.

Preview **Partner / referral system**

A firm network with referral tracking.
The model is built; the marketplace is building.

Run Every Case

The operating system of record - intake to resolution, plus firm admin.

Live **Matters lifecycle**

The system of record for matters - stages, parties, and key dates.

Live **Contacts / CRM**

An address book with a relationship and conflict graph.

Live **Calendar / docket**

Month, week, and agenda views with events and reminders.
Live; rule-derived deadline cascades are in Preview (see the deadline / rules engine).

Live **Tasks & workflows**

A task board with a configurable workflow engine and approval queue.

Live **Documents / DMS**

Encrypted document storage with version history, filed to the matter.
Live; e-signature is on the roadmap (see E-signature / RON).

Live **Time tracking**

Manual and timer-based time entry with narratives.
Live; AI-proposed draft time entries are in Preview.

Live **Billing (earned-fee)**

Invoices, expenses, payments, and pre-bills - earned-fee only.
Earned-fee billing only; explicitly not a trust ledger (see Trust / IOLTA accounting).

Live **Reporting & analytics**

Revenue, realization, A/R aging, and conversion KPIs.

Live **Data import / migration**

Guided CSV import with field mapping and a dry-run preview.
Live; direct adapters for other systems are on the roadmap.

Live **Practice Hub**

Per-practice-area coverage with a verification queue.

Live **Practice Primer / pack generator**

Auto-drafts a practice pack for attorney verification before go-live.

Live **Document automation / forms**

Learn a form once, confirm the field map, and auto-fill it on any matter.
Refuses to recreate mandatory official forms.

Live **Practice intelligence feeds**

Monitors secondary legal sources into a review queue.
Items stay labeled unverified until an attorney reviews them.

Preview **Deadline / rules engine**

Rule-based deadline calculation with an attorney-verification pipeline.

The engine is built, but no jurisdiction is attorney-verified or shipped yet - it does not emit confident dates until counsel signs off.

Preview **Shared verified library**

Verified, content-free pack scaffolds shared across firms.

Behind a UPL / E&O sign-off gate before real-firm go-live.

Preview **Trust / IOLTA accounting**

A trust-ledger engine with three-way reconciliation.

Flag off; activates per jurisdiction after CPA and bar review.

Preview **Litigation readiness**

UTBMS/LEDES e-billing and e-discovery support.

Flags off; synthetic data only today.

Roadmap **Physical-doc orchestration**

Reads an inbound notice, extracts dates, and proposes a deadline cascade.

Extraction is built; vendor wiring pending.

Roadmap **E-signature / RON**

E-signature and remote online notarization.

Behind the NY SB 1780 gate.

Roadmap **Voice / call capture**

Turns a call into a conflict-screened lead and dictation into a draft time entry.

Twilio / A2P gated.

Roadmap **Attorney continuity deadlines**

CLE, bar, and pro-hac-vice deadlines with break-glass coverage.

A business / scope decision.

Live **Roles / RBAC + ethical walls**

Custom roles, per-matter access, supervision, and an access map.

Live **Team & onboarding**

Invite staff, assign roles, and follow guided onboarding.

Live; offboarding automation is in Preview.

Live **Settings / firm config**

Firm profile, packs, rates, numbering, and custom fields.

Live; advanced config is in Preview.

Live **Scheduled automation**

Opt-in background jobs for reminders and alerts.

Roadmap **Governance control centers**

Recovery, governance, access/walls, audit, compliance, finance, client-experience, and growth control centers.

Specs written; which are built is being confirmed.

Preview **Enterprise suite [Enterprise]**

An in-house front door, proposals, account-based marketing, and outside-counsel review.
Surfaces are live; the workflows are building. Enterprise tier.

Ward Runs It With You

Your in-boundary AI chief of staff - it proposes, you approve.

Live Ward / chief of staff

One in-boundary assistant across the firm - it proposes, you approve.
The core assistant is live; advanced action surfaces are in Preview.

Live Case-file RAG

Grounded, cited Q&A and summaries over a matter's documents.

Live Smart AI routing

Routes each task to the right model, escalating to a frontier model only for complex work.
The "no surprise AI bills" story.

Preview Matter intelligence / doc-set analysis

Cross-matter status and risk with structured extraction.
Matter-level AI is live; cross-matter analysis is building.

Roadmap Ward grounding & citation layer

Every answer shows its sources - "show your work."
Spec written.

Roadmap Proactive obligation view

A continuous, forward-looking view of your obligations.
Spec written.

Preview Confidential AI

A privilege ledger with in-boundary redaction.
Flag off.

Roadmap Comms track-changes + voice learning

Diffs Ward's draft against your edits and learns your firm's voice.
Spec written.

Your Clients Love It

A firm-branded client experience that markets itself.

Preview Client portal (web)

A firm-branded portal for status, documents, and invoices.
The web surfaces are live and rolling out.

Live Two-brand client surfaces

Your client sees your firm's brand; LexSteward stays invisible.

Preview Client-Ward mode

A scoped client-facing assistant - Full, Limited, or Off - that never gives legal advice.
Off by default; the firm controls the mode.

Activates with your account

Payment links / no-login pay

A passwordless pay link so clients can pay by card.

Built; activates with the firm's payment account.

Roadmap

Client SMS / two-way texting

Status and reminders with inbound replies filed to the matter.

Behind an A2P provider + DPA gate.

Private by Default

In-boundary AI, isolation, and ownership - privilege-grade by default.

Live

In-boundary AI

Client data never hits a public LLM; frontier work runs under a BAA.

The sharpest wedge; aligned to the /trust boundary - a frontier model is opt-in and off by default.

Live

Per-firm encryption (AES-GCM)

PII and content encrypted with a per-firm key.

Live; the customer-managed-key (CMK) go-live gate is still open.

Live

Data residency at signup

An immutable region set at signup - US or Canada, region-pinned and fail-closed.

The region is pinned at signup and enforced in-app; physical in-region storage all the way down to backups is on the roadmap (rides the residency go-live gate).

Live

Multi-tenant isolation

Every query is firm-scoped.

Live; a database row-level-security backstop is planned.

Live

Export / ownership

Export everything anytime, across every module. No lock-in.

On-demand export is live; scheduled self-export delivered to your own storage activates with the backup/DR gate.

Live

Backup & recovery

Continuous backup, an immutable copy, and tested restore and rollback.

Live

Audit trail

An append-only log of material changes.

Live

Vendor pass-through (BYO)

Connect your own vendor accounts; DPA and residency checks fail closed.

The framework is live; specific adapters vary.

Preview

Device trust / remote sign-out

See known devices and revoke a session mid-use.

Design complete; wiring in progress.

Preview

Sovereign / BYO-KMS / zero-knowledge [Sovereign]

You hold the key - single-tenant, on-prem, or air-gapped.

Design-only today; the Sovereign tier, not live. The "zero-knowledge / technically unable to read" claim is reserved to this tier.

Roadmap **SOC 2 / HIPAA / PIPEDA**

Third-party security and compliance certifications.

Referenced as roadmap; not yet obtained.

Roadmap **Assisted redaction / de-identification**

Mask PII before sharing or sending to AI, and harden intake de-identification.

Spec written.

Disclaimers

LexSteward is a legal-technology platform, not a law firm, and does not provide legal services or advice. Security and compliance certifications referenced as roadmap items are not yet obtained. Sovereignty and data-residency guarantees depend on the chosen deployment configuration and are confirmed during procurement. Vendors and safeguards are disclosed by function; specific implementations may change without weakening these commitments. Every feature listed is labeled with its status as of the date shown; statuses are reviewed before publication.

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